

Annual Benefit Statement

Your annual benefit statement is enclosed with this edition of the *Informer*. Review it carefully and contact SERS if you have any questions. Your statement contains information on group health, life insurance and beneficiaries. Refer to your statement during the annual Benefit Choice insurance enrollment period in May.

The statement also contains your SERS beneficiaries and an annuitant identification card. Cut out the I.D. card and carry it with you as proof of your association with the state of Illinois for government and retiree discounts.

Federal Income Tax Withholding Notice

Monthly benefits paid by SERS are subject to federal income tax withholding. SERS notifies benefit recipients of their right to have federal tax withheld from their benefits each year.

If you have a request on file for federal income tax to be withheld, it will continue to be honored unless you request a change.

You must inform SERS in writing if you want to change or end your withholding. If there is not a withholding election on file, taxes will be withheld as if you were married claiming three exemptions.

A married person with three exemptions would have no withholdings taken on a benefit of less than \$1,238.00 per month (\$14,856.00 annually), unless it is requested.

You may have to pay taxes and penalties at the end of the year if your estimated tax payment(s) are not adequate for the tax year.

SERS will notify you through the *Informer* of any changes in federal tax laws that affect your withholding.

State Income Tax

In 1989, the North Carolina General Assembly enacted a bill which deducts up to \$4,000 from federal taxable income for all government retirees. In 1998, the North Carolina Supreme Court ruled that any government employee with five or more years of creditable service as of August 1989 would be exempt from North Carolina state income tax on their retirement benefits.

This ruling did not apply to retirees from other states, but a new bill exempting ALL government retirement benefits from North Carolina state tax is making its way through the North Carolina legislature.

SERS retirees residing in North Carolina should show their support for the enactment of this new bill by contacting their North Carolina legislators. If you have questions, you can call Gwendoline Fortune at 336-376-0995.

THE RETIREE PRAYER

*Grant me the serenity
to forget the people I
never liked anyway,*

*The good fortune to
remember the ones
that I do,*

*And the eyesight to tell
the difference.*

SERS FACTOID

**As of March 1, 2001, SERS
has 26 pensioners who are
100 years old or older.**

RETIREE BENEFITS

Starting July 1, 2000, all Quality Care (UNICARE) members who are admitted to the hospital on a non-emergency basis are required to call the special pre-certification telephone number on the back of your Quality Care insurance card prior to admission.

In case of an emergency, you have 48 hours to call Quality Care at 1-800-327-7443.

This is a new requirement for all Quality Care members, even if you are enrolled in Medicare. If you have questions, call the Insurance Section at 217-785-7150.

The new pre-certification issue is

one of the many topics discussed in the SERS workshop, ***Myths & Realities of Retirement*** (MRR). The MRR is offered to SERS retirees, survivors, disability benefit recipients and their guests. This free one-day workshop lasts from 9 a.m. until 3:30 p.m.

Other topics covered are financial and estate planning, health, Social Security and group insurance benefits.

If you would like to attend an MRR workshop, complete the enrollment application below and return it to SERS. Information about the exact workshop location will be mailed to you.

SERS currently has 55 retirees who have been retired for 35 or more years. To make the most of your retirement years, we urge you to enroll in a MRR workshop.

Circle the 2001 MRR workshop that you would like to attend.

Mar. 7	Marion (07)	Jun. 27	Galesburg (23)
Mar. 13	Schaumburg (77)	Jul. 16	Springfield (01)
Mar. 21	Chicago (02)	Jul. 24	Normal (33)
Mar. 27	Peoria (13)	Jul. 26	Moline (46)
Apr. 10	Quincy (36)	Jul. 31	Carbondale (96)
Apr. 17	Joliet (47)	Aug. 14	DeKalb (49)
Apr. 26	Urbana (34)	Aug. 21	Decatur (78)
May 22	Rend Lake (22)	Aug. 28	Alton (45)
Jun. 6	Taylorville (31)	Aug. 29	Collinsville (15)
Jun. 12	Rockford (90)		

Name _____

Social Security Number _____

Are You Bringing a Guest? _____

Return this form to:

State Retirement Systems
Field Services Division
2101 S. Veterans Parkway
P. O. Box 19255
Springfield, IL 62794-9255

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